

S.T.E.M.S.

*Street Tree Electronic
Management System*

Installation & User's Manual



**Beta Manual
Ver. 080504**

**USDA Forest Service
Northeast Center for Urban & Community Forestry
<http://www.umass.edu/urbantree>**

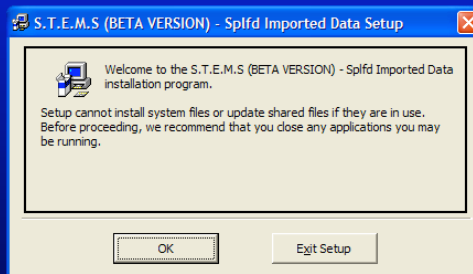
S.T.E.M.S Installation Manual.

PLEASE PRINT THIS DOCUMENT BEFORE YOUR PROCEED. IT IS IMPORTANT THAT YOU FOLLOW THE INSTRUCTIONS EXACTLY AS INDICATED.

The following steps will guide you thru the insatallation of the STEMS software on your computer and Pocket PC. Please follow the steps in the order presented.

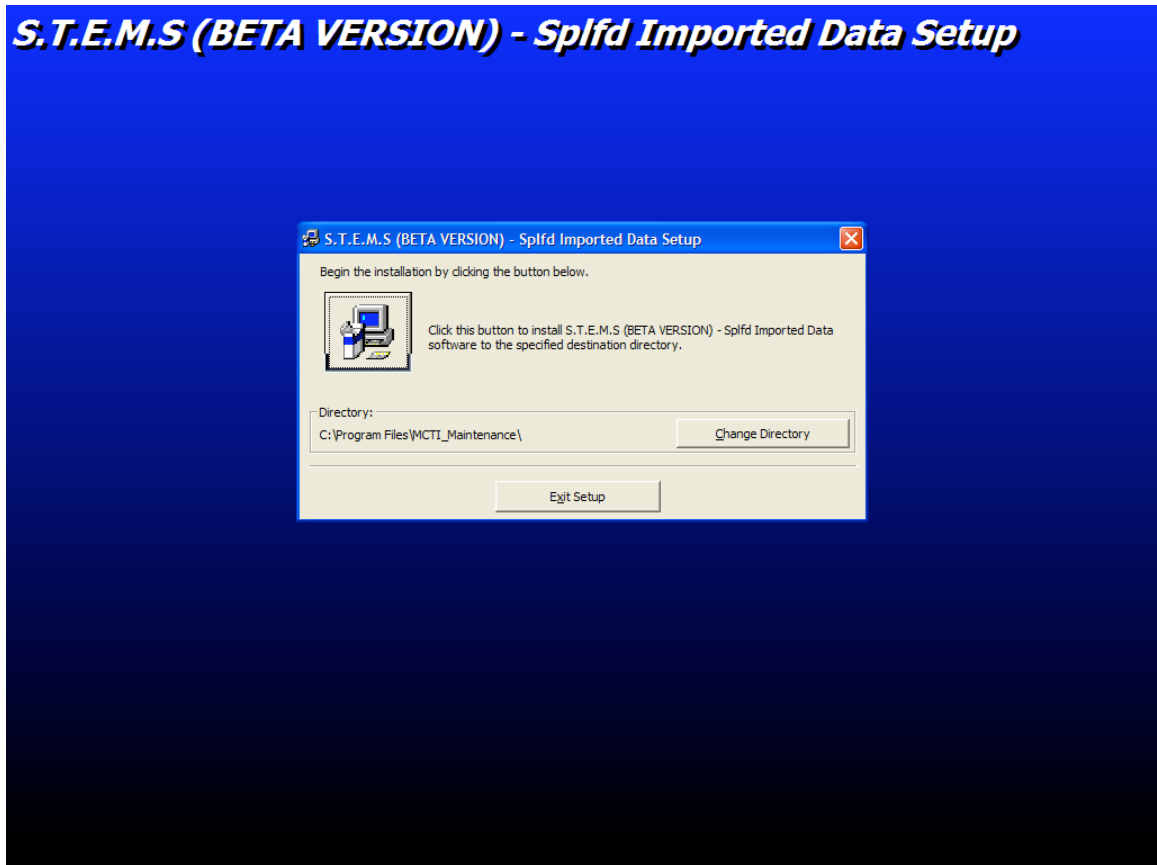
1. A prompt screen will appear. Click the “Ok” button. (See Figure-1)

S.T.E.M.S (BETA VERSION) - Splfd Imported Data Setup



(Figure-1)

2. Make sure you have the proper directory (The install program provides a recommended location for the files) and click the large button with the picture of a computer on it. (See **Figure-2** & **Figure-3**)

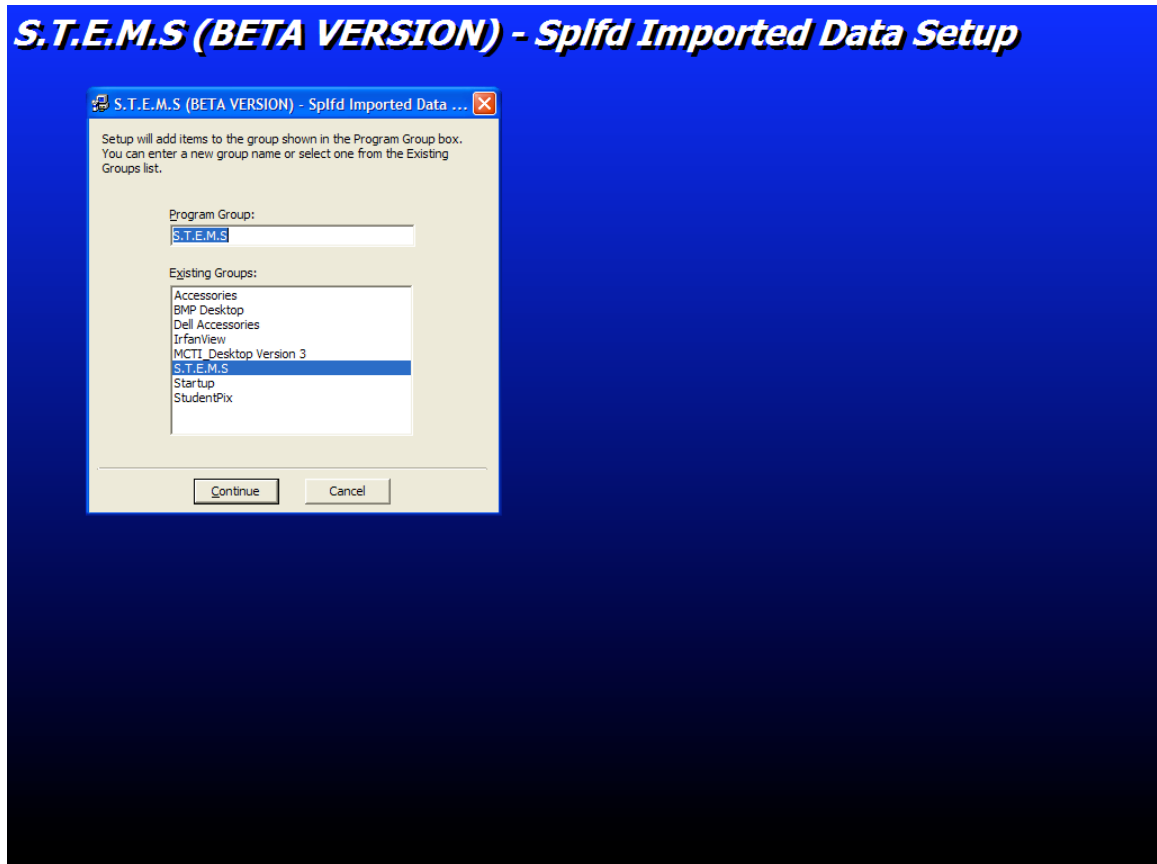


(Figure-2)

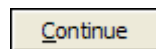


(Figure-3)

3. Select the program group as S.T.E.M.S and click “Continue” (See **Figure-4** & **Figure-5**)

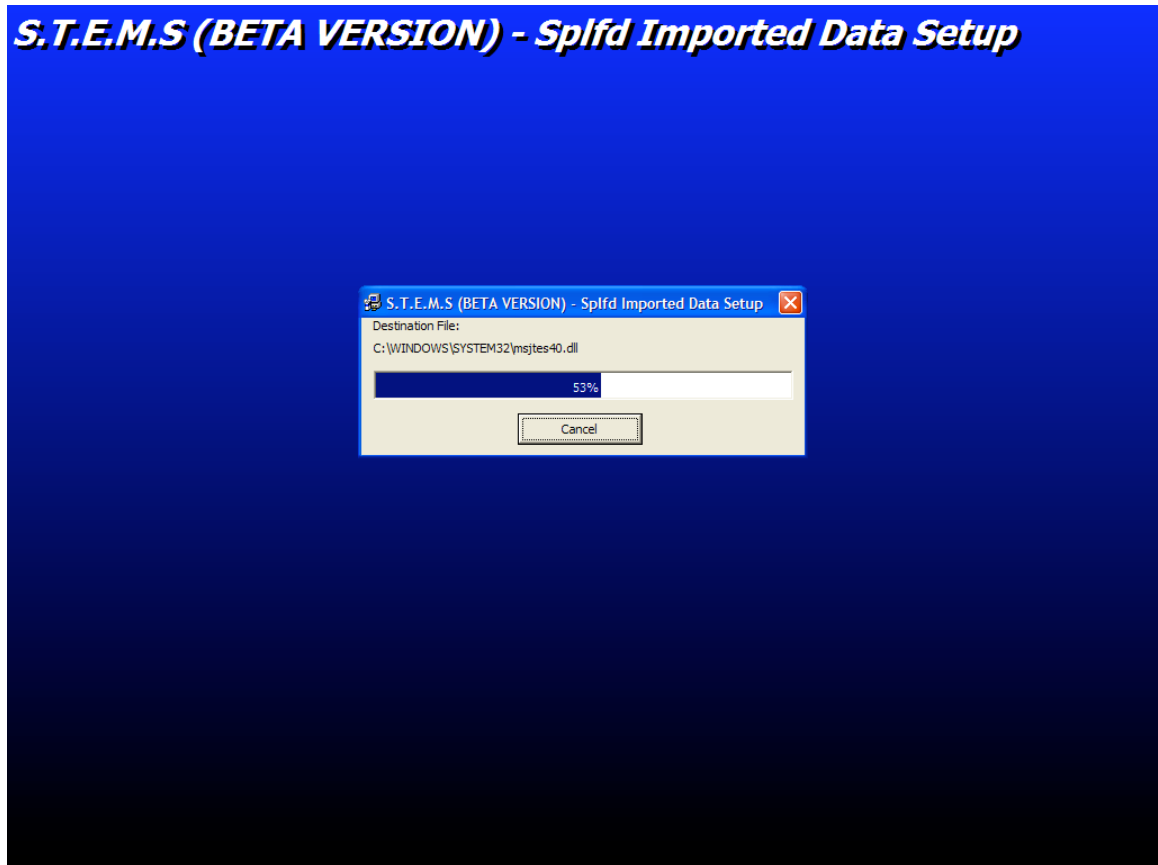


(Figure-4)



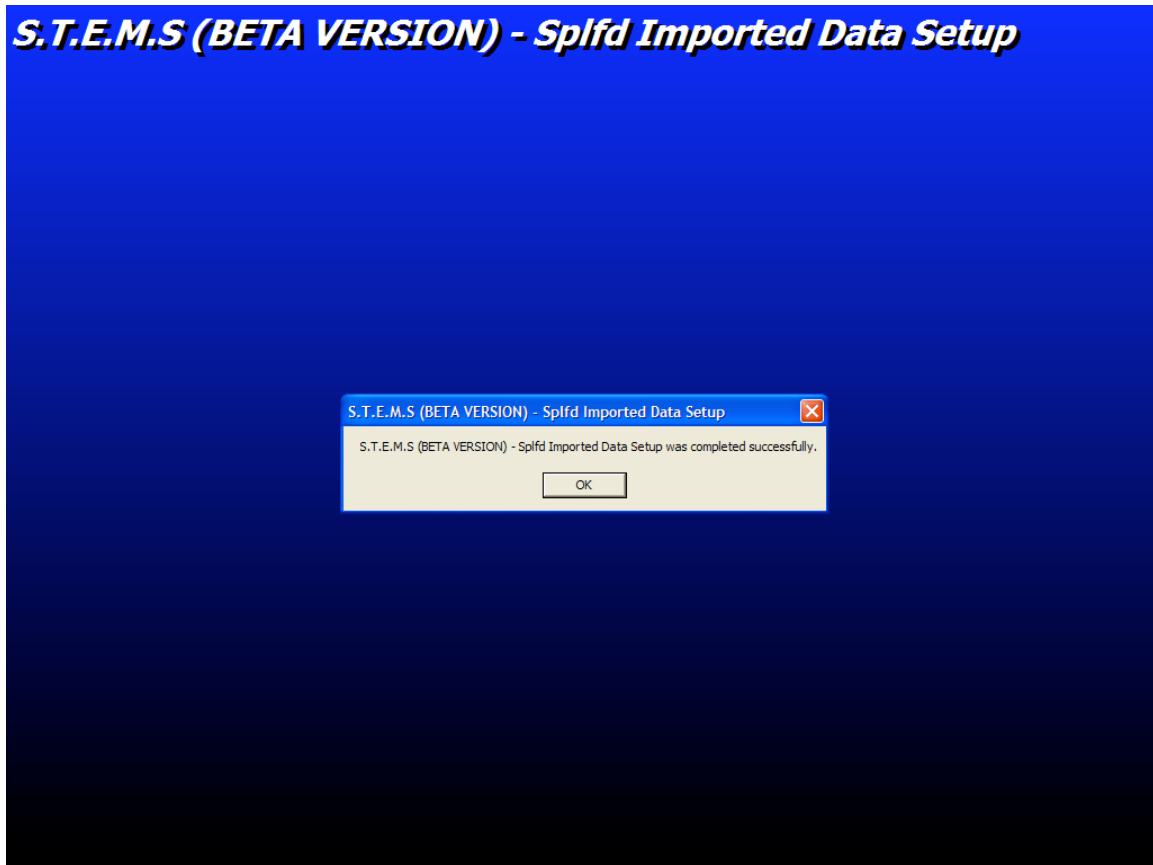
(Figure-5)

4. The files will install for about one minute. (See **Figure-6**)

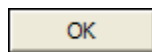


(Figure-6)

5. When shown the install was “completed successfully” click the “Ok” button. (See **Figure-7** & **Figure-8**)



(Figure-7)



(Figure-8)

INSTALLATION COMPLETE

Running the S.T.E.M.S program.

Make sure your computer is turned on and you are logged in properly.

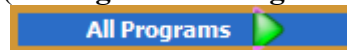
Once you are in your desktop:

1. Click the “Start” button. (See **Figure-9**)

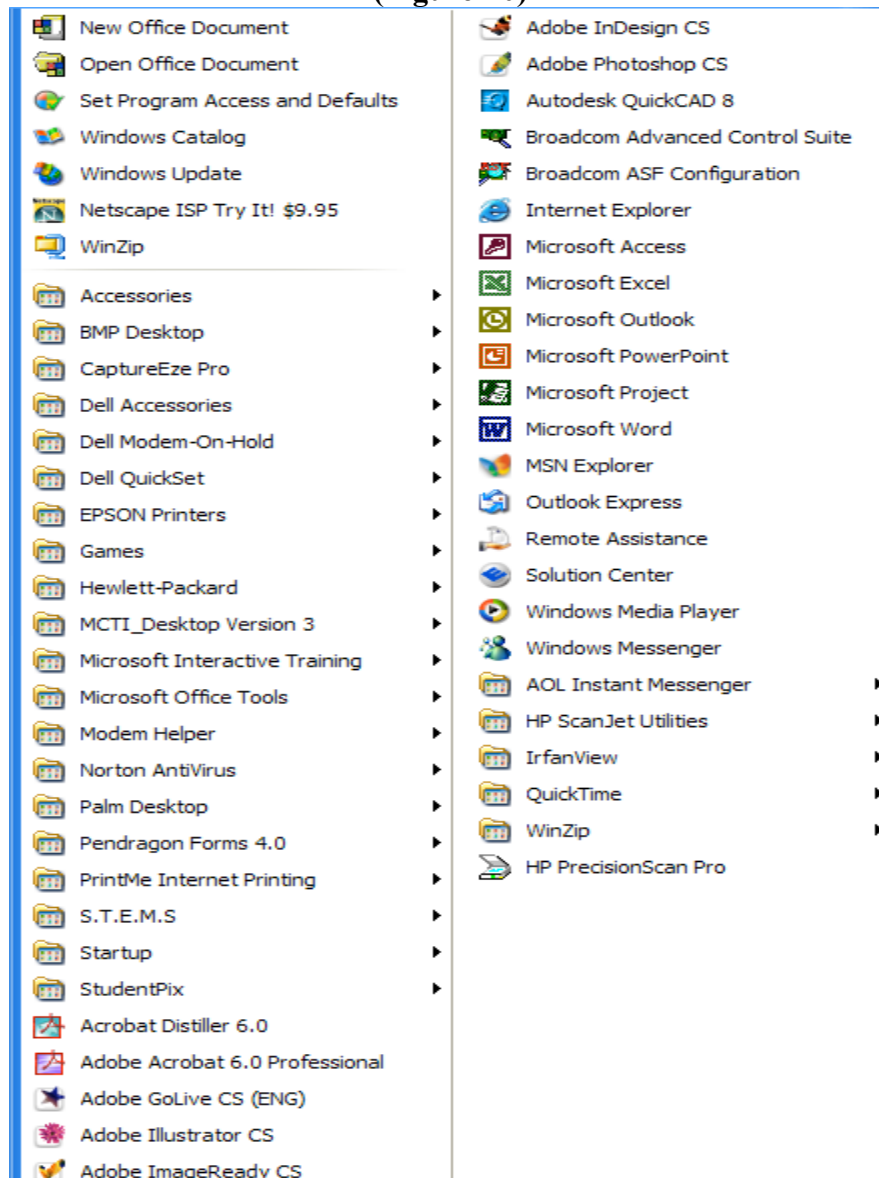


(Figure-9)

2. A menu appears. Move your cursor until its above the “All programs” menu. A larger menu will appear. (See **Figure-10 & Figure-11**)

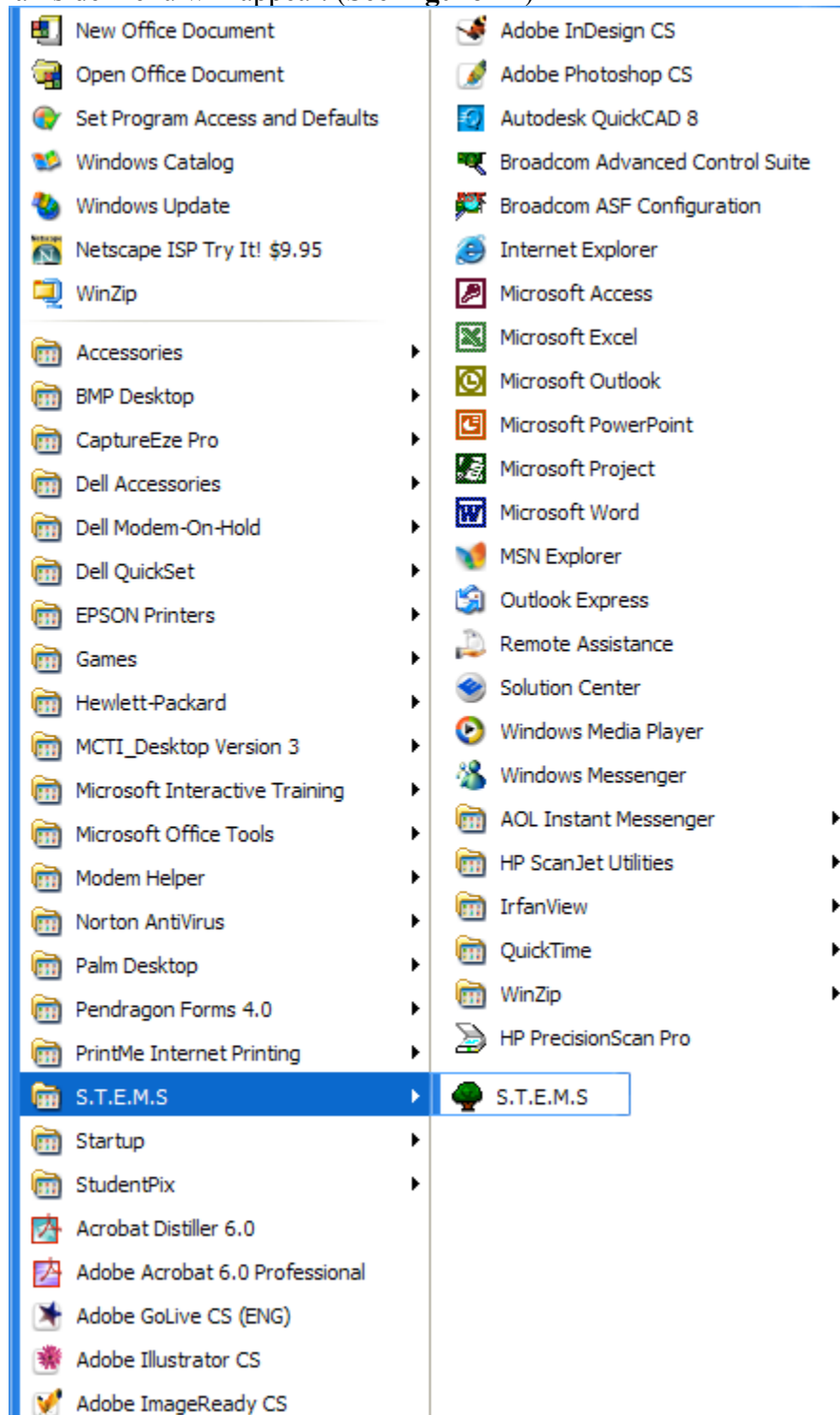


(Figure-10)



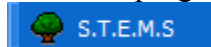
(Figure-11)

- Find the S.T.E.M.S group in the program list and move your cursor so its over it. A small side menu will appear. (See Figure-12)



(Figure-12)

4. Choose the S.T.E.M.S extension and the program should run. (See **Figure-13**)



(Figure-13)

Adding a Complaint

Make sure the program is running.

1. At the main menu screen, click the “Complaints” tab. (See **Figure-14**)



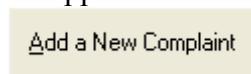
(Figure-14)

2. A new window will appear. Choose the “Location of Tree (Street Name)” at the top of the page. Browse through the list until the desired street is found. (See **Figure-15**)

A beige rectangular window titled "Location of Tree (Street Name)". Inside, there is a dropdown menu with "GREENBRIER ST" selected and a small downward arrow button to its right.

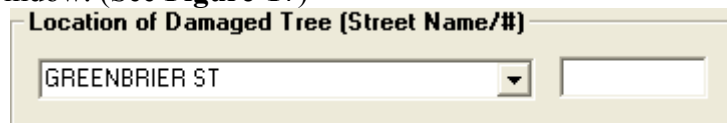
(Figure-15)

3. Click the button “Add New Complaint”, located at the bottom of the window. (See **Figure-16**) A new window will appear.



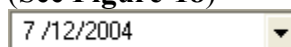
(Figure-16)

4. Write the house number after the already chosen street name, located at the top of the new window. (See **Figure-17**)

A beige rectangular window titled "Location of Damaged Tree (Street Name/#)". It contains a dropdown menu with "GREENBRIER ST" selected and a small downward arrow button to its right, followed by an empty text input field for the house number.

(Figure-17)

5. Choose the complaint date. (See **Figure-18**)

A beige rectangular dropdown menu showing the date "7 /12/2004" and a small downward arrow button to its right.

(EXAMPLE DATE)

6. Choose the status of the complaint. (See **Figure-19**)

1 - Inspected - Not a public tree

(EXAMPLE)
(Figure-19)

7. Inspection Date????? Dave??????
8. Local ID #??????????? Dave?????

9. Identify the nearest major intersection under the category “Nearest Major Intersection” (See **Figure-20** , the highlighted material)

Adding a Complaint

Location of Damaged Tree (Street Name/#)

Complaint Date

Status Inspection Date (Make sure the box is UNCHECKED to set HQ Inspection Date)

Local ID # =>

Complaint Info **Notes**

Nearest Major Intersection

Description of Damage/Problem

Complainant(s) Contact Information

Cancel **Save** **Exit**

(Figure-20)

10. Identify the damage in the “Description of Damage/Problem” category. (See Figure-21, the highlighted material.)

The image shows a software window titled "Adding a Complaint". It contains several input fields and buttons. The "Description of Damage/Problem" text area is highlighted with a blue border. The "Status" dropdown is set to "Open". The "Inspection Date" is set to "7/12/2004". The "Local ID" field is empty. The "Complaint Date" is set to "7/12/2004". The "Location of Damaged Tree (Street Name/#)" is set to "GREENBRIER ST". The "Nearest Major Intersection" is empty. The "Complainant(s) Contact Information" is empty. The "Cancel", "Save", and "Exit" buttons are at the bottom.

Adding a Complaint

Location of Damaged Tree (Street Name/#)

Complaint Date

Status Inspection Date Local ID # ==>

(Make sure the box is UNCHECKED to set NO Inspection Date)

Complaint Info **Notes**

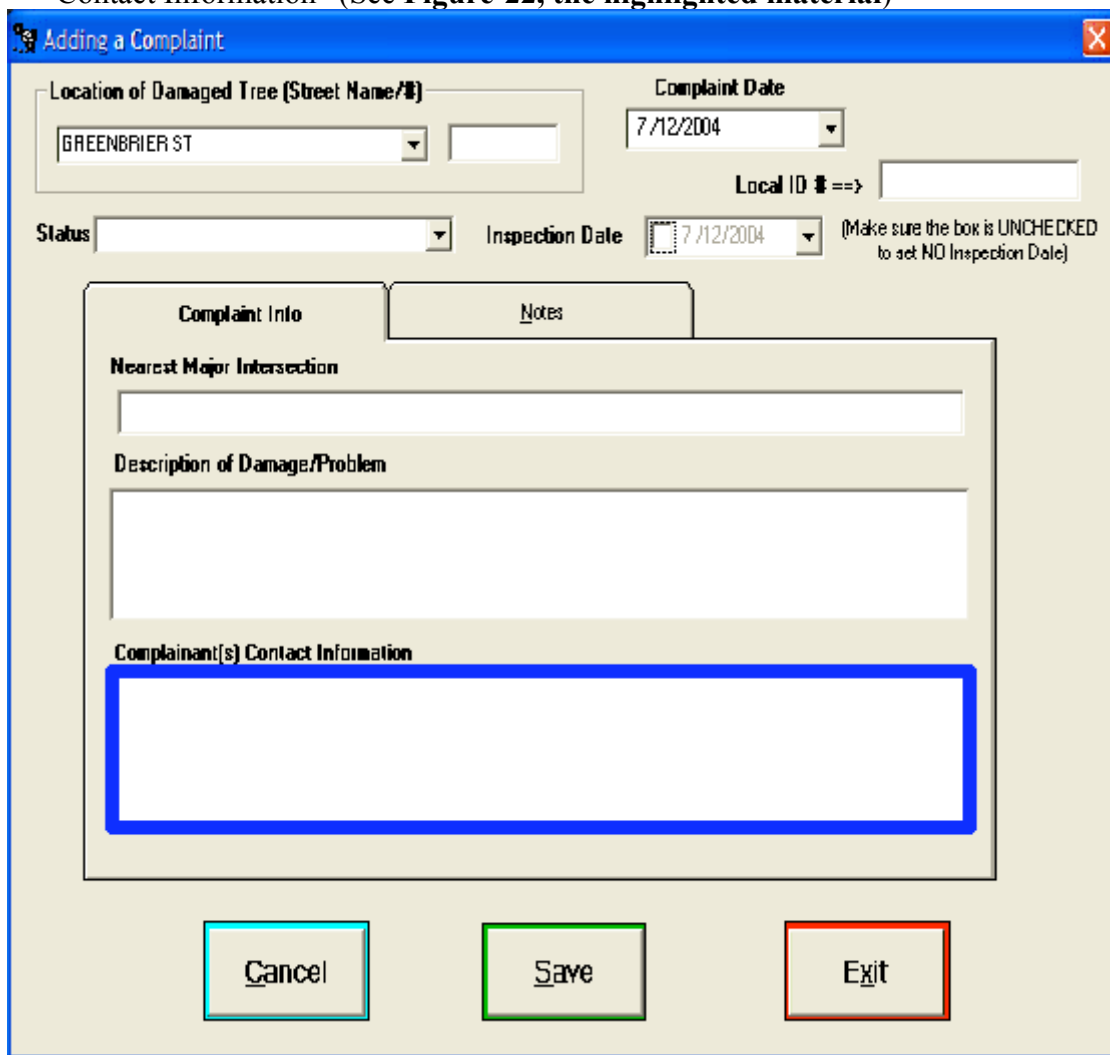
Nearest Major Intersection

Description of Damage/Problem

Complainant(s) Contact Information

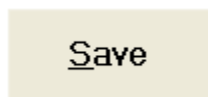
(Figure-21)

11. Identify the complainants contact information under the category “Complainant(s) Contact Information” (See **Figure-22**, the highlighted material)



(Figure-22)

12. Once that is all done click the “Save” button found at the bottom of the window. (See **Figure-23**)



(Figure-23)

13. This will return you back to the “Find Complaints” window. The complaint you just added will be highlighted already so double-click it to re-enter it. (See **Figure-24**)

The screenshot shows the 'Find Complaints' window with the following elements:

- Search Complaints:** Radio buttons for 'All', 'All for Selected Street' (selected), and 'Address Range for Street'.
- Location of Tree (Street Name):** A dropdown menu showing 'GREEN LA'.
- Include Status Codes:** Radio buttons for 'ALL' (selected), 'ONLY OPEN (Code 0)', and 'ONLY "Needs WO" (Code 3)'.
- Sort By:** Radio buttons for 'Complaint #' (selected), 'Date (most recent first)', and 'Street & Street Number'.
- Include Complaint Dates:** A date range selector showing 'Jan 01, 2004' to 'Jul 13, 2004'.
- # Found:** A yellow box displaying the number '2'.
- Search/Refresh:** A button with a magnifying glass icon.
- Table:** A table with 6 columns: Complaint #, Street, Address #, Date of Complaint, Status, and Description. It contains two rows of data.
- Instructions:** A text prompt 'RIGHT Click on a Complaint to Change It's Status'.
- Action Buttons:** A row of five buttons: 'View Selected Item', 'Add a New Complaint', 'Delete Selected Item', 'Print List As Shown', and 'Exit'.

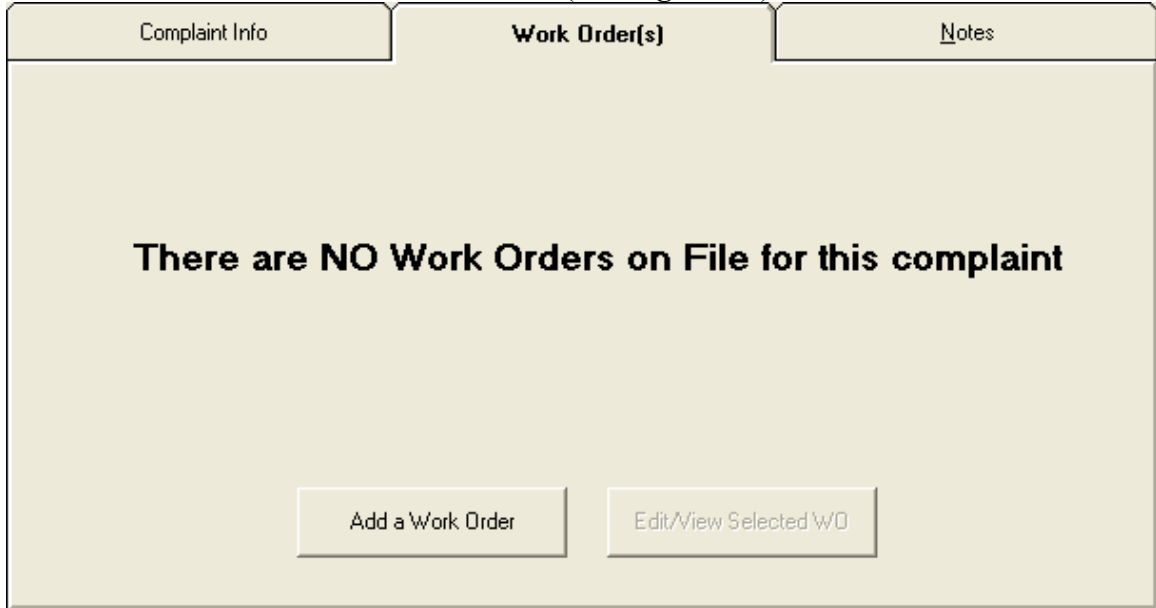
Complaint #	Street	Address #	Date of Complaint	Status	Description
29499	GREEN LA	31	07/02/2004	0	the darn tree was cut in ha
29506	GREEN LA	0	07/13/2004	0	sw

(Figure-24)

END OF SECTION

GENERATING A WORK ORDER

1. The window you were in before appears again. Except, now there is another tab labeled “Work Orders”. Click the tab. (See **Figure-25**)



(Figure-25)

2. Since there are no work orders yet for your complaint, it will state it. Click the “Add a work order” button. A new window will appear. (See **Figure-26**)



(Figure-26)

3. Once again, you will be asked to enter the nearest major intersection in the box labeled “NMI” (See **Figure-27**)



(Figure-27)

4. Enter the priority of the complaint. (See **Figure-28**)



(Figure-28)
(EXAMPLE)

5. Mark whether or not there was storm damage. (See **Figure-29**)



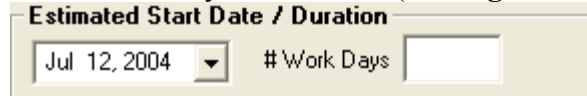
(Figure-29)

6. Choose which crew/contract to assign the job to. (See **Figure-30**)

A horizontal dropdown menu with a light beige background. The text '2 - Crew 2' is displayed in a standard black font. A small downward-pointing arrow is visible on the right side of the menu.

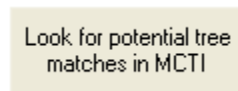
(Figure-30)

7. Choose the “Estimated Start Date/Duration” by selecting the day it will start and entering the amount of work days it will take. (See **Figure-31**)

A form titled 'Estimated Start Date / Duration' in bold black text. Below the title, there are two input fields. The first field is a date selector showing 'Jul 12, 2004' with a small dropdown arrow. The second field is labeled '# Work Days' and is an empty text box.

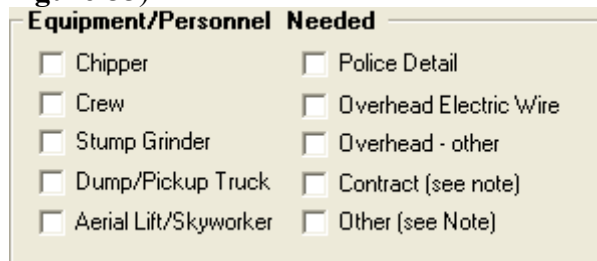
(Figure-31)

8. On the lower half of the window there are two tabbed windows; “Details” , and “Description of Job/Notes” Make sure the “Details” menu is selected by clicking the tab.
9. In that area, enter the “MCTI ID’s for Affected Trees (if known).…”
10. If there may be a match for the MCTI ID you have entered you can check by clicking the “Look for potential tree matches in MCTI” button (See **Figure-32**)

A rectangular button with a light beige background and a thin black border. The text 'Look for potential tree matches in MCTI' is centered on the button in a black font.

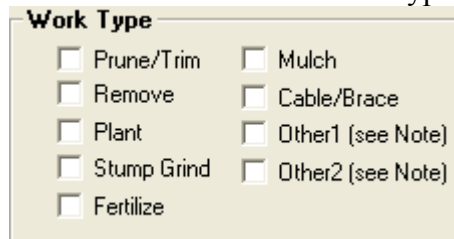
(Figure-32)

11. Choose the equipment needed under the “Equipment/Personnel Needed” category. (See **Figure-33**)

A form titled 'Equipment/Personnel Needed' in bold black text. Below the title, there is a list of items, each preceded by an unchecked checkbox. The items are arranged in two columns: Chipper, Crew, Stump Grinder, Dump/Pickup Truck, Aerial Lift/Skyworker, Police Detail, Overhead Electric Wire, Overhead - other, Contract (see note), and Other (see Note).

(Figure-33)

12. Choose the things needed to be done in the “Work Type” box. (See **Figure-34**)

A form titled 'Work Type' in bold black text. Below the title, there is a list of tasks, each preceded by an unchecked checkbox. The tasks are arranged in two columns: Prune/Trim, Remove, Plant, Stump Grind, Fertilize, Mulch, Cable/Brace, Other1 (see Note), and Other2 (see Note).

(Figure-34)

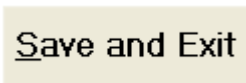
13. Next to the “Details” tab click the “Description of Job/Notes” tab to open that area. (See **Figure-35**)

The image shows a software window with a light beige background. At the top, there are two tabs. The left tab is labeled 'Details' and is currently selected. The right tab is labeled 'Description of Job/Notes' and is currently active. Below the tabs is a large, empty rectangular text area with a thin black border, intended for entering notes or descriptions.

(Figure-35)

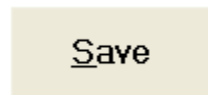
14. Enter any notes needed.

15. Once all of this information is entered click “Save and Exit” (See **Figure-36**)



(Figure-36)

16. Hitting that brings you to the previous screen. Click the “Save” button. (See **Figure-37**)

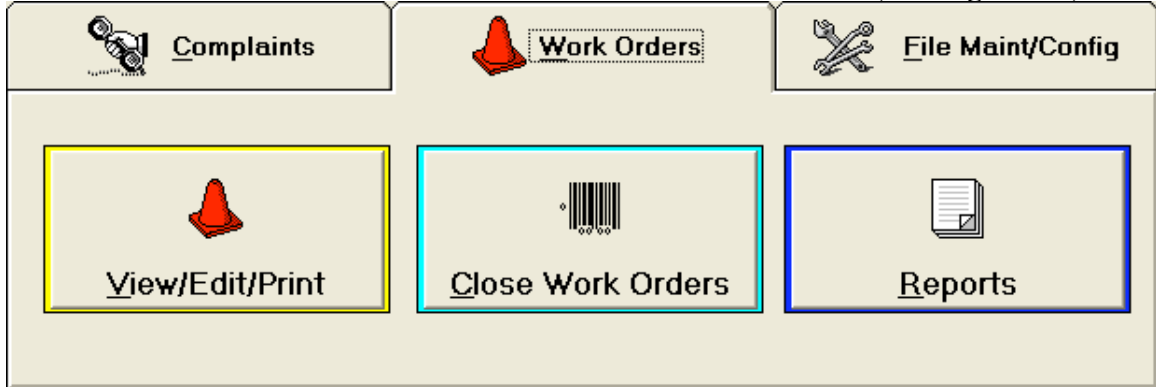


(Figure-37)

END OF SECTION

VIEWING, EDITING, AND PRINTING WORK ORDERS

1. At the main menu window click the tab labeled “Work Orders”.(See **Figure-38**)



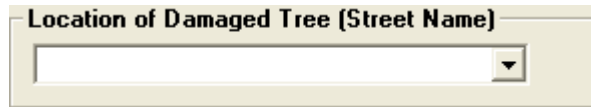
(Figure-38)

2. Click the button labeled “View/Edit/Print”(See **Figure-39**)



(Figure-39)

3. A new window will come up. Type in the street name in the box labeled “Location of Damaged Tree (Street Name)”.(See **Figure-40**)



Location of Damaged Tree (Street Name)

(Figure-40)

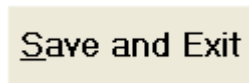
4. Click the button labeled “Search/Refresh”(See **Figure-41**)



(Figure-41)

5. A list will come up showing all if the work orders. TO EDIT/VIEW THIS WORK ORDER: Choose the desired on by double clicking on it.

6. Enter the desired information and click save to return back to the previous window.(See **Figure-43**)



(Figure-43)

7. TO PRINT THIS WORK ORDER: Once you have clicked the button labeled “Search/Refresh” select the desired work order by clicking it only once, to highlight it.(See **Figure-44**)

	WO #	Street	Address #	Priority	Complaint #	Crew Code	Start Date
▶	24141	GREEN LA	31	2	29499	2	Fri 07/02/2004

(Figure-44)

8. Click the button at the bottom left corner of the window labeled “Print Selected WO’s”(See **Figure-45**)

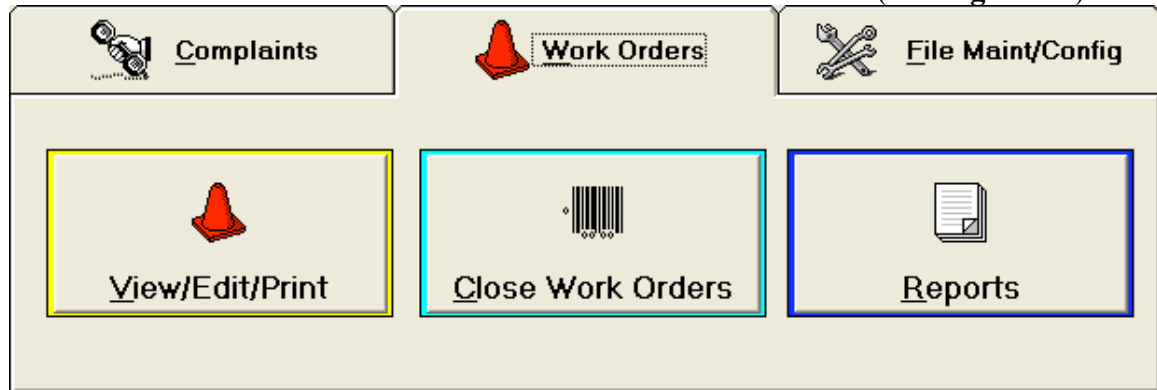


(Figure-45)

END OF SECTION

CLOSING WORK ORDERS

1. At the main menu window click the tab labeled “Work Orders”.(See **Figure-45**)



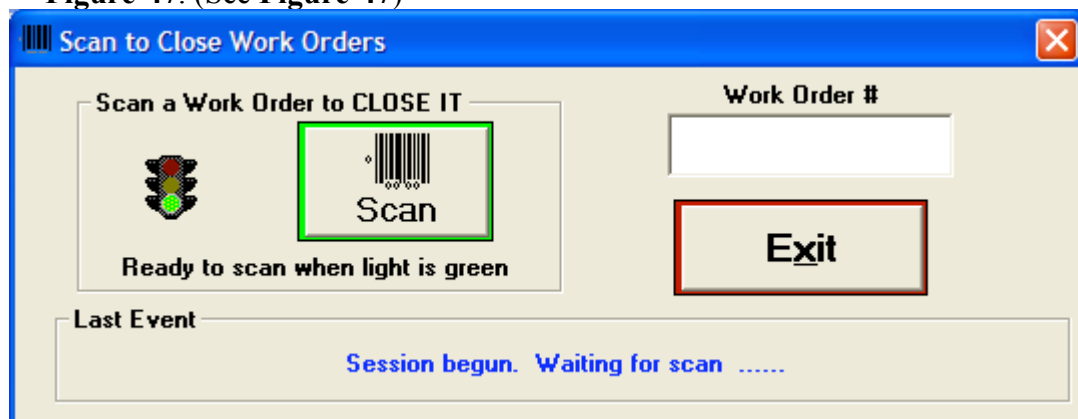
(Figure-45)

2. Click the button labeled “Close Work Orders” (See **Figure-46**)



(Figure-46)

3. Another window will appear. Enter the Work Order # in the given box, shown in **Figure-47**. (See **Figure-47**)



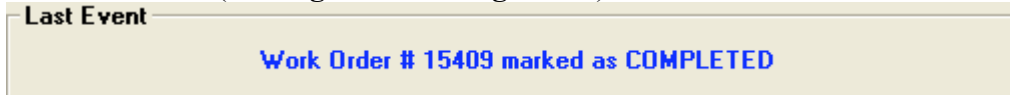
(Figure-47)

4. Once you have done that click the button labeled “Scan” (See **Figure-48**)

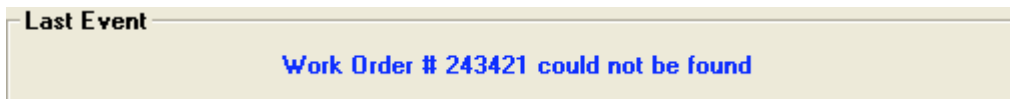


(Figure-48)

5. The status window below the scan button should tell you whether or not the scan was successful. (See **Figure-49** & **Figure-50**)



(Figure-49)
(Successful Scan)



(Figure-50)
(Unsuccessful Scan)

6. Scan all of the work orders needing closing and when you are finished click the “Exit” button to return you to the previous screen. (See **Figure-51**)

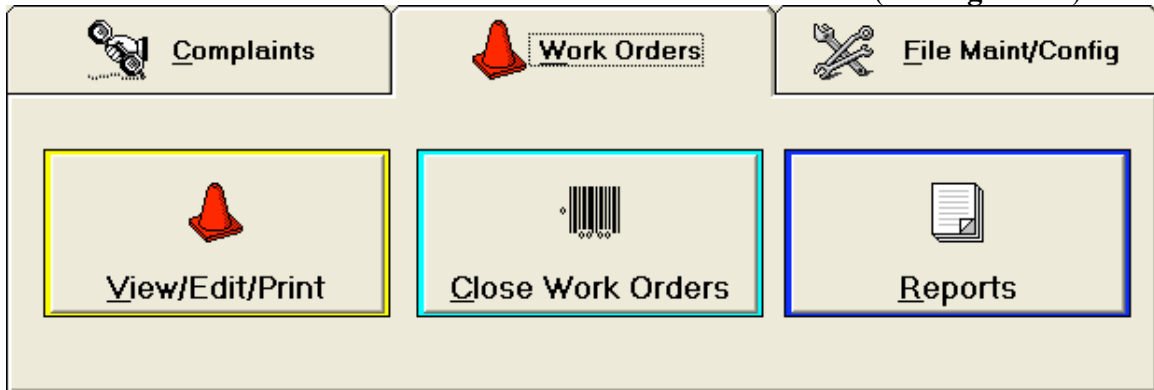


(Figure-51)

END OF SECTION

PRINTING REPORTS

1. At the main menu window click the tab labeled “Work Orders”.(See **Figure-52**)



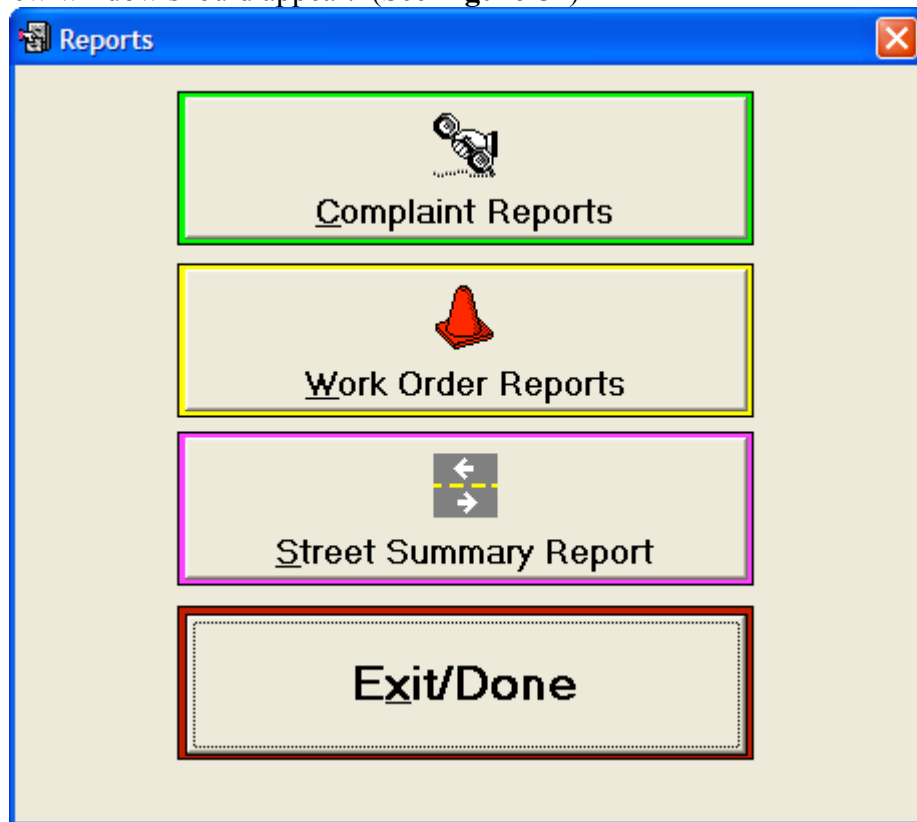
(Figure-52)

2. Click the button labeled “Reports” (See **Figure-53**)



(Figure-53)

3. A new window should appear. (See **Figure-54**)



(Figure-54)

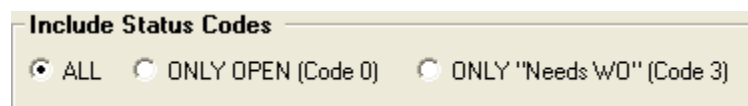
TO PRINT A COMPLAINT REPORT

- Click the button labeled "Complaint Reports" (See **Figure-55**)



(Figure-55)

- Enter the street name of where the complaint took place in the box labeled "Location of Tree (Street Name)"
- Choose where to include status codes in the given window. (See **Figure-56**)



(Figure-56)

- Choose which complaints to search and whether or not to exclude certain ones in the box labeled “Search Complaints” (See **Figure-57**)

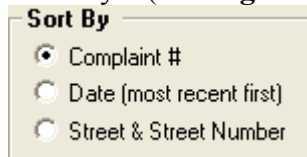


Search Complaints

☐ All
☒ All for Selected Street
☐ Address Range for Street

(Figure-57)

- Choose what things to sort the complaints by, by selecting an option in the box labeled “Sort by”. (See **Figure-58**)

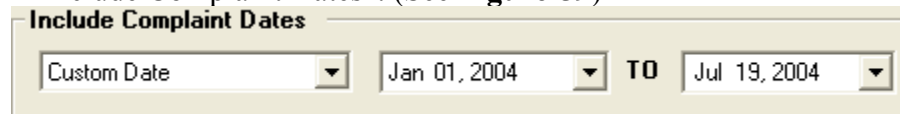


Sort By

☒ Complaint #
☐ Date (most recent first)
☐ Street & Street Number

(Figure-58)

- Include the complaint dates if there are any in the given box labeled “Include Complaint Dates”. (See **Figure-59**)

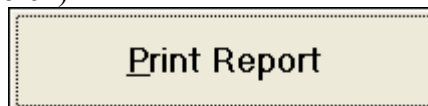


Include Complaint Dates

Custom Date TO Jan 01, 2004 Jul 19, 2004

(Figure-59)

- Once everything is correctly entered click the button labeled “Print Report” The report will open itself in another window. (See **Figure-60** & **Figure-61**)



Print Report

(Figure-60)

- Enter the street name of where the complaint took place in the box labeled “Location of Tree (Street Name)”
- Choose which complaints to search and whether or not to exclude certain ones in the box labeled “Search Complaints” (See **Figure-63**)

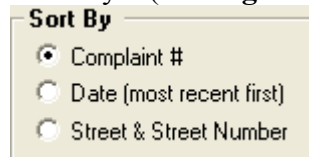


Search Complaints

☐ All
☒ All for Selected Street
☐ Address Range for Street

(Figure-63)

- Choose what things to sort the complaints by, by selecting an option in the box labeled “Sort by”. (See **Figure-64**)

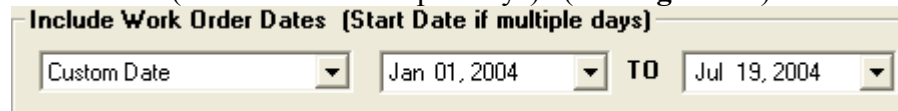


Sort By

☒ Complaint #
☐ Date (most recent first)
☐ Street & Street Number

(Figure-64)

- Enter in any work order dates in the box labeled “Include Work Order Dates (Start Date if Multiple Days)” (See **Figure-65**)



Include Work Order Dates (Start Date if multiple days)

Custom Date ▼ Jan 01, 2004 ▼ TO Jul 19, 2004 ▼

(Figure-65)

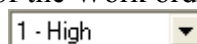
- Choose whether or not to include completed work orders. (See **Figure-66**)



☐ **Include COMPLETED Work Orders**

(Figure-66)

- Choose the Priority of the Work order. (See **Figure-67**)



1 - High ▼

(Figure-67)

- Once all of this information is entered click the button labeled “Print Report.” (See **Figure-68**)



(Figure-68)

- Once you are finished with the report click “Exit” and then click “Exit” once more to bring you to the initial reports window. (See **Figure-69**)



(Figure-69)

TO PRINT STREET SUMMARY REPORTS:

- Once you are back at the Reports window click the button labeled “Street Summary Report”. (See **Figure-70**)



(Figure-70)

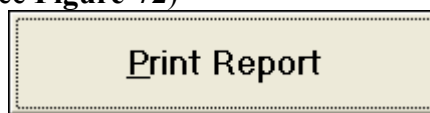
- Enter the specific street summary report date period in the given option pull down boxes. (See **Figure-71**)

Street Summary Report (Specify Date Range)

Custom Date	▼	Jan 01, 2004	▼	TO	Jul 20, 2004	▼
-------------	---	--------------	---	----	--------------	---

(Figure-71)

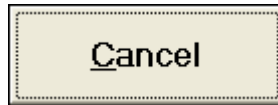
- Once all of this information is entered click the button labeled “Print Report.” (See **Figure-72**)



(Figure-72)

- Once you are finished with the report click “Exit” and then click “Cancel” to bring you to the initial reports window. (See **Figure-73** & **Figure-74**)

(Figure-73)



(Figure-74)

4. Once every desired report has been printed click the “Exit” button to go back to the main menu.

END OF SECTION

STREET LIST IMPORTING

Street names for your city/town can be imported from an excel file for your use.

CREW LIST IMPORTING

Crew lists from your city/town can be imported for your use.

MCTI FOLDER

The MCTI folder of your city/town can be imported to your S.T.E.M.S. program by selecting the proper file path and directory.

END OF SECTION

END OF MANUAL.